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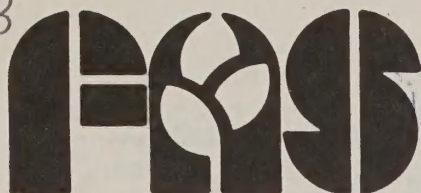
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WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE

WR 8-83

WASHINGTON, Feb. 24--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

GRAIN AND FEED

CHINA's government has estimated total grain production for 1982 at a record 344.3 million tons, 6 percent above last year. Despite a 3-percent acreage drop, record production was achieved due to record grain yields. Total grain production includes wheat, rice, coarse grains, soybeans, tubers and pulses. Rough rice production, which comprises about 45 percent of total grains, is estimated at a record 153 million tons, up almost 7 percent from the 1981 level. The wheat harvest also was a record -- 63 million tons, up almost 8 percent from the previous year. Corn production increased 7 percent to a record 63.5 million tons. Other coarse grain production, including barley, oats, sorghum and millet, is estimated at 24.7 million tons, 7 percent above last year.

DAIRY, LIVESTOCK AND POULTRY

In the SOVIET UNION, much of the improved production and productivity of livestock on state and collective farms is due to last year's good forage harvest and a generally mild winter.

January meat production on Soviet state and collective farms was 4 percent above January 1982, but still below the January 1981 level. Production of beef, pork and poultry meat were up 2 percent, 5 percent and 12 percent, respectively, over 1982. Sheep meat production was down 5 percent. Production of milk and eggs were up 11 percent and 7 percent, respectively. Increased state procurements have largely matched the production increases.

Average liveweight at slaughter was reported at 375 kilograms for cattle and 108 kilograms for hogs, both above 1982. For cattle, the January weight was below the 1980-81 average, while the weight for hogs was above it.

February 1 inventories for cattle, hogs and poultry, at 90.6 million, 56.6 million and 687.0 million head, were all records for that date. Sheep numbers were down and cow numbers just equaled the 1982 level.

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COTTON AND FIBERS

The major cotton producing region in the SOVIET UNION--Uzbekistan--could suffer a serious water shortage this summer, according to recent Soviet reports. Irrigation water will probably be in short supply because little snow has fallen this winter in the Pamir and Tien Shan Mountains, which are the primary watershed for that republic. Water levels in the reservoirs in Uzbekistan have been dropping the past several years and were very low last year. As a result, Soviet cotton production totaled only 9.3 million tons, compared with 9.6 million in 1981. Uzbekistan produced about 6.0 million tons last year, 6.0 million in 1981 and 6.2 million in 1980. All cotton in the USSR is irrigated and is grown in areas that receive little, if any, precipitation during the growing season.

Since January, the SOVIET UNION's cotton trade with Western Europe has been virtually halted because of a combination of factors. Soviet cotton production in 1982 was slightly below the 1980 and 1981 levels due to poor weather during harvest. More importantly, the quality of the crop may be significantly below previous years. In addition, the Soviet textile industry appears to be exerting pressure to obtain larger cotton supplies for domestic consumption needs. Reportedly, the USSR has purchased at least 45,000 bales of Australian high-grade strict-to-good middling quality cotton and have inquired about purchasing Central American cotton.

In turn, the Soviets are apparently withholding trade offers from the market until they have a clearer picture of their domestic supply and demand situation. Cotton trade negotiations with East European countries, which historically account for more than 50 percent of Soviet cotton exports, were delayed more than two months, and current negotiations are expected to seek to limit supplies. One additional factor may account for Soviet reluctance to offer cotton to Western Europe. As cotton is a key foreign exchange earner for the USSR, the Soviets are particularly sensitive to low prices in the international market and may be waiting for prices to rebound.

AUSTRALIA has announced that a new cotton research program, provided for by the cotton levy bill of 1982, will begin in March. A levy of \$1 per bale (225 kg.) paid by the private sector will be matched on a dollar-for-dollar basis by the government. The monies collected will be used to help finance cotton production research.

TOBACCO

BRAZIL's 1983 tobacco crop is estimated by the U.S. agricultural counselor in Brasilia at 390,000 tons, 5 percent above last year's harvest. While the crop was earlier forecast at 400,000 tons, above normal rains during the September-November planting period in southern Brazil resulted in a lower than forecasted harvest. Rio Grande do Sul, the largest tobacco producing state in Brazil, had precipitation 200 percent above normal in November.

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Earlier this year, the AUSTRALIAN Agricultural Council set the minimum average price for marketing quota flue-cured tobacco leaf to be sold during the 1983 selling season at 4.66 Australian dollars (US\$4.37) per kilogram. This is an increase of 21 Australian cents (US\$0.20) per kilogram over the minimum average price set for the 1982 season, or a rise of about 5 percent. The increase is intended to compensate for higher production costs. The minimum average price is based on the average of the announced minimum price schedule and an assumed normal grade distribution of the crop. The first leaf sales will commence in Mareeba, Queensland, in March.

The percentage of JAPAN's population that smokes fell again in 1982, according to the recently released results of the annual Tobacco and Salt Public Corporation's tobacco consumption survey. The percentage dropped from 42.2 percent in 1981 to 41.8 percent in 1982. The proportion of men that smoke slipped to 70.1 percent from 70.8 percent in 1981, but the share of female smokers rose from 15.3 percent to 15.4 percent. Despite the drop in the share of smokers, cigarette sales were up 0.7 percent during 1982. An increase in cigarette prices is expected to result in another drop in the percentage of smokers and may even lower actual cigarette sales in 1983.

Leaf tobacco exports from BRAZIL during the first 10 months of 1982 totaled 148,150 tons. Exports are estimated to have totaled 162,000 tons during the January-December 1982 period. This is substantially above the 148,369 tons shipped during 1981. Exports to the United States reached 48,040 tons during January-October, 63 percent above the total 1981 shipments of 29,563 tons. High U.S. domestic prices, a strong U.S. dollar, tight U.S. supplies of burley leaf early in 1982 and a high-quality Brazilian crop all contributed to the increased exports to the United States during the past year. Brazilian exports during 1983 are forecast to increase to 174,000 tons.

SUGAR

CHINA is expected to produce a record 3.9 million tons of raw sugar during the 1982/83 season--3.15 million tons from sugarcane and 750,000 tons from sugarbeets. The U.S. agricultural counselor in Beijing attributes larger area and yields to higher government purchase prices and the provision of food grain rations and fertilizers to growers as an incentive for planting sugar crops. The counselor also reports that China has expanded its sugar milling capacity by 1.23 million tons since 1980 to a total of 3.9 million tons per year.

FRUITS AND NUTS

In SPAIN, sub-zero temperatures and snow blanketed the Iberian Peninsula during February 10-13, causing serious damage to blooming almond trees, citrus and several sub-tropical fruits and vegetables. Trade estimates place losses for the 1983/84 almond crop at 20,000 - 30,000 tons (shelled basis), or 40 percent of a projected crop of 60,000 - 70,000 tons.

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SPAIN's 1982/83 citrus crop, previously estimated at 2.9 million tons, has been subjected to freezing temperatures by a recent series of cold weather. While no official estimate has yet been established for crop losses, lemon areas located in Murcia and Malaga provinces accounted for most of the citrus damage. Damage of citrus also occurred in Valencia, Seville and Cordoba provinces. The freezing weather arrived during the peak of Spain's harvest period. Dry weather during the previous two months had limited irrigation water supplies and the only precipitation recently occurred in the form of snow.

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Selected International Prices

Item	: February 22, 1983		: Change from		: A year	
	:		: previous week		: ago	
	\$ per MT	\$ per bu.	\$ per MT		\$ per MT	
ROTTERDAM PRICES 1/						
Wheat:						
Canadian No. 1 CWS-13.5%*	198.00	5.39	+1.00		N.Q.	
U.S. No. 2 DNS/NS: 14%*...	169.50	4.61	-.50		184.00	
U.S. No. 2 DHW/HW: 13.5%..	N.Q.	--	--		199.00	
U.S. No. 2 S.R.W.....	159.50	4.34	-1.50		166.00	
U.S. No. 3 H.A.D*.....	169.00	4.60	-1.00		187.50	
Canadian No. 1 A: Durum*..	186.00	5.06	-1.00		209.00	
Feed grains:						
U.S. No. 3 Yellow Corn....	132.00	3.35	-1.00		248.00	
U.S. No. 2 Sorghum 2/.....	N.Q.	--	--		145.00	
Feed Barley 3/.....	N.Q.	--	--		N.Q.	
Soybeans and meal:						
U.S. No. 2 Yellow.....	241.00	6.56	-1.25		248.00	
Brazil 47/48% SoyaPellets 4/	229.00	--	+2.50		N.Q.	
U.S. 44% Soybean Meal.....	214.00	--	-1.00		232.00	
U.S. FARM PRICES 5/						
Wheat.....	131.18	3.57	+.37		132.28	
Barley.....	67.98	1.48	+.92		89.56	
Corn.....	102.75	2.61	-1.18		92.12	
Sorghum.....	101.41	4.60 6/	+1.54		85.98	
Broilers 7/.....	985.46	--	+60.62		1000.45	
EC IMPORT LEVIES						
Wheat 8/.....	107.70	2.93	+1.94		86.65	
Barley.....	113.14	2.46	+1.63		65.40	
Corn.....	96.82	2.46	+.39		96.60	
Sorghum.....	93.53	2.38	+1.06		77.80	
Broilers 9/.....	316.00	--	+2.00 10/		278.00	
EC INTERVENTION PRICES 11/						
Common wheat(feed quality)	186.94	--	+1.18		185.61	
Bread wheat.....	205.48	--	+1.30		213.82	
Barley and all						
other feed grains.....	186.94	--	+1.18		185.61	
Broilers 12/.....	1080.00	--	+17.00		N.Q.	
EC EXPORT RESTITUTIONS (subsidies)						
Wheat.....	76.28	2.08	+1.43		-0-	
Wheat flour.....	N.Q.	N.Q.	N.Q.		N.Q.	
Barley.....	88.97	1.94	-.31		40.99	
Broilers 9/.....	214.00	--	+1.00 13/		174.00	
Sugar, refined 15/.....	N.Q.	--	N.Q.		N.Q.	

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Optional delivery: Argentine Granifero sorghum. 3/ Optional delivery: Canadian feed barley. 4/ Optional delivery: Argentine. 5/ Based on selected major markets and adjusted to reflect farm prices more closely. 6/ Hundredweight (CWT). 7/ Nine-city average; wholesale weighted average. 8/ Durum has a special levy. 9/ EC category--70 percent whole chicken. 10/ Reflects exchange rate change and not level set by EC. 11/ Reflects change by EC effective Feb. 1, 1983 from 31.8 ECU's/100 kg. to 33.15 ECU's/100 kg. **Reflects exchange rate change only. 12/ F.O.B Price for R.T.C. Whole Broilers at West German border. 13/ Subsidy increase reflects change by EC Effective Feb. 1, 1983 from 20.50 ECU's/100 kg to 22.50 ECU's/100 kg. 14/ F.o.b. price for whole R.T.C. broilers at West German border. N.Q.=Not quoted.

Note: Basis March delivery. * April-May.

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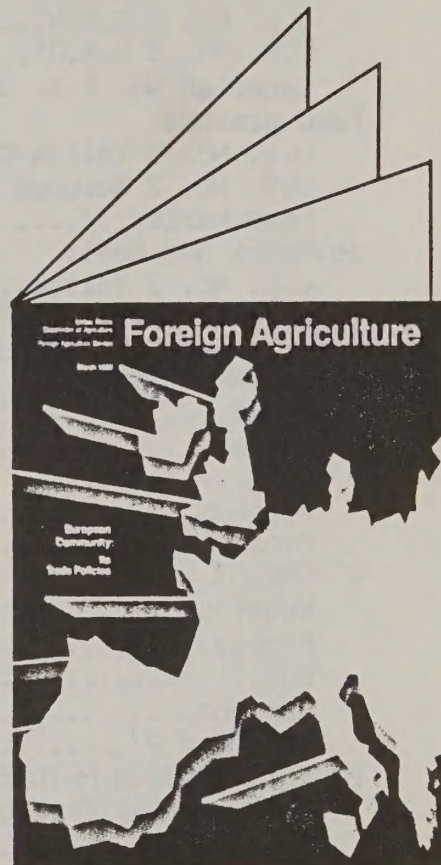
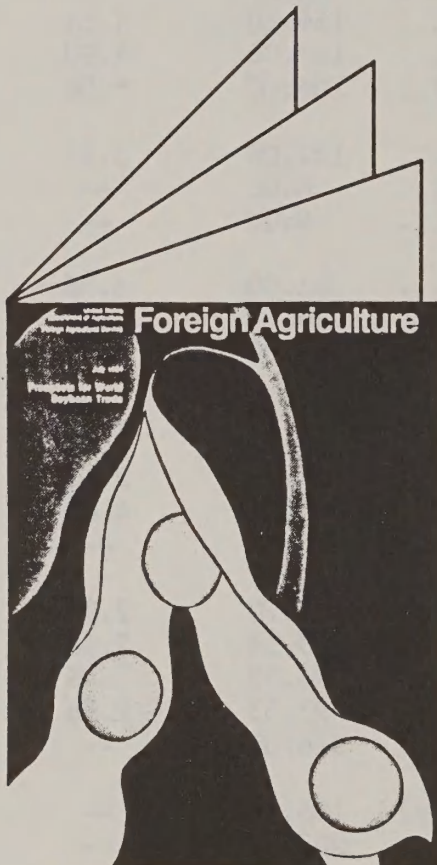
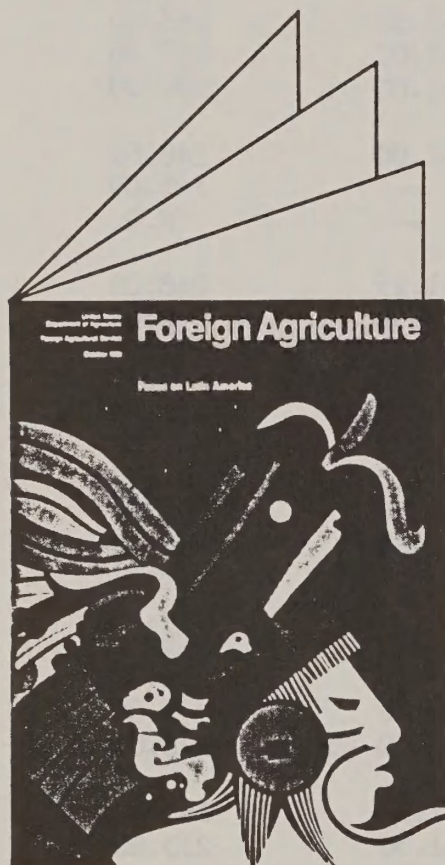
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